

Case Study

Grosvenor Technology

Integrating Sage 300 with Salesforce



Company Details



Founded in the UK in 1989, Grosvenor Technology is a leading supplier of access control and workforce management solutions. Its product offering encompasses hardware, software and IP/cloud-based products and services for customers of all sizes, ranging from education and retail to defence and healthcare. It has built an impressive blue chip client list, which includes Argos, H&M, Tesco, Bank of America and BAE Systems.



The Challenge

- Replace bespoke legacy software
- Integrate Salesforce and Sage 300
- Improve business processes and efficiency

Applications used

- Sage 300
- Salesforce



The Solution

- Integrated Sage 300 with Salesforce
- Automated transfer of orders from Salesforce to Sage 300
- Automated the extraction of invoiced figures from Sage 300 into Salesforce

Platform & Capabilities Used

- BPA Platform
 - ⇒ Data Integration & Synchronisation



The Results

- Improved the processing of orders leading to better efficiency
- Ability to implement long overdue business plans
- Opportunity to offer online trading to customers

i The Challenge

Replacing troublesome middleware

Grosvenor Technology uses Sage 300 for accounting and Salesforce as its CRM system. In order to manage its orders and the entire sales process, Grosvenor Technology requires these two systems to be integrated and have the ability to easily share and transfer information.

A middleware solution, described by Grosvenor Technology as a “black box”, was deployed a few years ago to accommodate this. However, this proved to be unreliable, slow, difficult to understand, and costly to extend.

“We had issues with the solution that was originally installed as it didn't actually fulfil all our requirements. It was a very bespoke solution and very difficult to re-code in order to make the two platforms talk to each other. Basically, we paid for a solution that suited the platforms and not our working practices,” explained **Peter Jones, IT Manager, Grosvenor Technology**. “We simply couldn't focus on getting our other business processes working until this was fixed.”

Grosvenor Technology therefore decided to instigate a request for proposal (RFP) to find a partner that had greater technical expertise, and a solution that provided greater visibility of processes and was easier to extend.

“Primarily, we needed a Salesforce partner that was going to work with us on the Salesforce side of things and solve the issue of getting Salesforce to talk to Sage. It's basically getting those two systems to talk to each other and work in a manner that makes our lives easier, rather than having to duplicate everything,” said Jones. “We looked at Codeless Platforms' solution and it seemed to fit with what we wanted. Especially as it provided us with complete control and it had been developed in such a way that it already worked with Sage and Salesforce. It wasn't new ground for the software, which was the previous issue. It was that integration experience that we liked the look of.”

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The Solution

Integrating Salesforce with Sage 300

Codeless Platforms' BPA Platform now provides Grosvenor Technology with the integration that it requires, enabling the company to send orders from Salesforce and place them into Sage 300.

"Our staff can now work solely in Salesforce; put orders on there and they effortlessly flow down into the account system where they can be shipped and invoiced, and so on. That's now working reliably. We managed to get a couple of extra things working in terms of extra bits of information flowing down to give us a bit more of a complete overview of the orders too. It's enabling us to set up process orders much quicker now," said Jones.

"One of the things that wasn't achievable previously was getting invoiced figures out of Sage 300 and putting those into Salesforce. Now we know what has been invoiced and we are seeing those figures come through, which is a massive improvement from where we were. The Sales Director can now just work within Salesforce rather than having to work in Salesforce and Sage. That was something that we managed to implement in the project that was a big improvement for us. The best thing that has materialised from this project is that we can now look at the system and decide what else to improve."

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The Result

BPA Platform improves efficiency

Implementing BPA Platform has been extremely positive for Grosvenor Technology, significantly effecting the entire sale process and helping to set up the business for future development and expansion.

“It’s finally put us in the position where we should have been almost two years ago. Once upon a time it was taking up to four hours for an order to get from one system to another, whilst sometimes it wouldn’t at all and it was holding everything up. Now that we’ve got that information transferring reliably we’re actually focusing on making our Salesforce environment better for us,” explained Jones.

“The amount of orders going through the system is the same, but it means they are being processed quicker. It’s that speed and reliability which counts. The sales team can therefore spend their time more efficiently. We can now start looking forward and improving and implementing plans that we’ve had for a long time but been stuck due to what we had in place before.”

Future Plans

The solution offered by Codeless Platforms offers Grosvenor Technology new opportunities like online trading should their clients require it in the future.

“Previously, this would have gone through Salesforce and through Communities; and that was all looking really expensive. Whereas now, with BPA Platform, we’ve got this extra hook into Sage and Salesforce, and we can bolt something else on,” said Jones. “It’s a more modular approach. If we have a problem we can easily sort it out via integration or automation. We’ve got various options with BPA Platform.”

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Want to learn more?

Discover how Codeless Platforms can help your business by improving performance, boosting efficiency and cutting costs



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